



FileHold

Document & Record Lifecycle Software

FileHold Service Level Agreement (SLA) for “On Premise” or “Private Cloud” Customers

For reasons of security or internal policies some customers prefer to install FileHold software on their own IT infrastructure or even their private cloud. For these customers FileHold offers a support program (FileCare) SLA that provides unlimited technical support and all product upgrades at no additional fee.

Software Support Methodology

Customers are supported in English using remote support services including email and web-based meeting tools. Only with a customer’s approval will FileHold support team log on to the customer's system using remote control software. Support is available from 12:00 am to 4:00 pm Pacific time Monday to Friday excluding certain local holidays. Additional support can be scheduled on weekends or evenings by prior arrangement.

The support process starts when a software user contacts their internal help desk, IT support department, or FileHold reseller. If the customer's internal support or reseller determines the problem is related to the document management software and cannot help, they will register the issue with support@filehold.com. Emails to FileHold support are monitored by FileHold technical staff over 16 hours per day, Monday to Friday.

Issue Severity Definitions

Following are the levels of issue severity:

- **Level 1 - Global severity** - All or most production users affected by an outage of functionality.
- **Level 2 - User severity** - One or a small number of production users affected by an outage of functionality.
- **Level 3 - Non-critical Severity** - A non-production or cosmetic issue, no significant effect on users or workaround available, or a product question.

FileHold Support Response Times

All support issues registered with FileHold support are assigned a unique support case number. The email will be responded to by a technical support team member by no later than noon of the next business day. In the response, it will be determined if the problem is related to the document management software, or a third-party application. A severity level will be established.

If the source of the problem is outside the control of FileHold the customer will be advised accordingly, and best efforts will be made to notify the party / parties responsible and cooperate with them to resolve such problem.

If the problem is within the control of FileHold the following responses are made:

- **Level 1 - Global severity:** Technical email communication will be initiated with the customer within 4 hours of severity determination. Continuous best efforts will be made to resolve the problem or until service is restored or until an interim remedy is implemented. The resolution objective is 1 business day.
- **Level 2 - User severity:** The source email communication will be initiated with the customer within 8 hours of severity determination. Best efforts to resolve the problem will be made with a resolution objective of 3 business days.
- **Level 3 - Non-Critical severity:** Email communication will be initiated with the customer within 16 hours of severity determination. Communication of the request will be made clear to the customer but resolution may wait until a future product release. If it is a product enhancement / future feature request the customer will be referred to [Suggest a Feature](#).

Support Escalation Policy

If a customer feels the support response times are not being met or the problem is not being addressed they may initiate direct contact with the head of customer services at support@filehold.com.

Customer Responsibilities

The FileCare document management subscription program is a powerful tool but customer is expected to have good IT governance and operations and follow normal good IT practices in protecting their data. The following are customer responsibilities for maintaining FileCare:

- The FileHold server must meet and maintain the [minimum system requirements](#). Problems with customer equipment, networks, Windows, and Microsoft SQL server should be corrected before contacting FileHold for assistance where possible. If FileHold technicians find problems with a customer equipment, networks, Windows or Microsoft SQL server, then the customer is responsible to fix the problems before FileCare continues to support the application.
IMPORTANT: The FileHold server must be dedicated to running FileHold.
- Report all problems via email to support@filehold.com immediately. Include a description of your issue along with screen shots if possible.
- The timely transmittal and release to FileHold of appropriate and accurate documentation and information related to the issue. You may be asked to run the [FileHold HealthChecker Tool](#) and provide the health report, event logs, applicable client logs, screen shots, and steps to reproduce to FileHold when reporting an issue. For large files, FileHold provides a [file transfer website](#). Where needed, make available your experts in Windows, network, and Microsoft SQL Server database administration to assist with the resolution.
- Back up all data on a daily, weekly, and monthly basis including all 4 Microsoft SQL Databases and SQL Log files, file directory storage paths and other critical system files. More details are outlined in the [Disaster Recovery and Backup Best Practices in the Document Management System article](#).

- Ensure routine maintenance is performed on the server hardware and software by appropriately skilled personnel. This includes, but is not limited to, maintaining appropriately configured malware tools, archiving and or truncating various system log files as appropriate, monitoring storage, RAM, and CPU capacity to ensure it continues to meet operational requirements.
- Ensure Microsoft and other service packs and updates are tested and applied to the server to maintain best practices operating conditions.
- Provide appropriate training on FileHold to staff that will be using or maintaining FileHold and take advantage of the extensive [Knowledge Base](#) on the FileHold web site. FileHold professional services have a variety of training programs available to ensure new staff are properly trained and existing staff are trained on new product features.

Software Disaster Recovery for Customers Installed on their own Server or their own Private Cloud

Catastrophic hardware failures or third-party component failures are not covered by FileCare but customers who are on the FileCare program can get help.

There may be professional services fees for this assistance which will be quoted at the time and based on a preferential customer billing rate. In the event of failure which results in loss of the document management software server the typical disaster recovery steps are as follows:

1. Customer registers and creates a support case detailing the extent of the disaster.
2. Customer will need to verify that their systems are compatible with the document management system requirements.
3. Remote Access to the customer systems via remote collaboration software must be available for the support team to access the system.
4. Customer will supply the two most recent backups of their data.
5. FileHold Systems will schedule a time to restore the live server using remote diagnostic tools.
6. A staging or testing server may be set up to properly recover the system without changing the primary server that is having issues (hardware or otherwise).
7. FileHold will test the server and confirm it is fully operational.
8. FileHold will help the customer test that all systems are operating as specified.